



*Office of Historic Alexandria
Departmental
Five-Year Strategic Plan
FY 2012-2016*

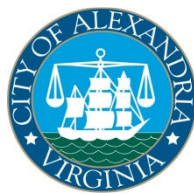


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The Office of Historic Alexandria Five-Year Departmental Strategic Plan FY 2012-2016

INTRODUCTION

The Office of Historic Alexandria (OHA), a municipal department within the government of the City of Alexandria, consists of the administrative unit and the following eight institutions: Alexandria Archaeology, Alexandria Black History Museum, Archives and Records Management, Fort Ward Museum and Historic Site, Friendship Firehouse, Gadsby's Tavern Museum, The Lyceum, and the Stabler-Leadbeater Apothecary Museum. The City Council, elected by the citizens, forms the trustee body and acts as the governing authority. All staff report through the director (department head) to the City Manager, who has been authorized by City Council to implement City policy and to perform certain functions of the government.

The role of OHA is that of responsible stewardship of resources held in the public trust for the historic City. This responsibility includes the preservation of historic sites, archaeological sites, artifacts and records, and the use of these resources in accordance with professional practices and standards of scholarship. These resources are an irreplaceable component of Alexandria's past and serve to maintain the City's quality of life, culture and sustainability.

The goal of the administrative unit and eight institutions that comprise OHA is to enhance the quality of Alexandria's urban environment for its residents by building a sense of community identity and continuity; by developing a sense of civic culture and pride in the community; by maintaining the City owned and operated museum system; by acquiring, protecting and preserving historic buildings, archaeological and historic sites, archives, records, collections and artifacts significant to the heritage of the City; by preserving and interpreting the historic cultural diversity of the City; and by supporting artistic expression. These significant contributions promote the City's national and international reputation. People and businesses are drawn to Alexandria as an attractive and vibrant location in which to live, work, and play.

WHERE HAVE WE COME FROM?

Results of Previous OHA Strategic Plan

During the period of time covering the previous OHA Five-Year Strategic Plan, the following objectives were met:

1. Collaboration between OHA and other heritage attractions in the City of Alexandria sites has increased through monthly meetings of the Historic Alexandria Resources Commission, and quarterly coordination of the Historic Alexandria Museum Gala and

Alexandria Forum events and planning for the Civil War Sesquicentennial.

2. Coordination of a calendar of events listing through the Alexandria Convention and Visitors Association and replacing the 300-copy printing of the weekly newsletter, *This Week in Historic Alexandria*, with an electronic version reaching over 2,400 subscribers by 2011.
3. Coordination of website participation by all Alexandria history attractions and museums open to the public on a regular basis, as well as a new and expanded departmental website for the Office of Historic Alexandria that can be updated quickly.
4. Partnership with Alexandria public schools to develop coordinated educational offerings, such as a teacher-in-service program.
5. Development of coordinated interpretive theme for all sites, "Forming a more perfect community."
6. Reorganization of Office of Historic Alexandria administration staff to provide increased marketing efforts.
7. Tours, geo-caches, cell phone tours and I-phone apps prepared on significant buildings and themes of the historic City.
8. Reorganization and expansion of departmental website.

WHERE ARE WE NOW?

Citizenship and Civic Culture

In addition to day-to-day public history operational duties and public programs, OHA also acts to promote and develop tourism initiatives, public history resources, and assists other City departments with inter-departmental planning and review, as well as providing staff support to the Alexandria Archaeological Commission, Alexandria Historical Restoration and Preservation Commission, Historic Alexandria Resources Commission, Public Records Advisory Commission, and the Fort Ward Ad Hoc Park and Museum Area Stakeholder Advisory Group. Through these efforts OHA seeks to develop a sense of citizenship with residents of the community through its programs and outreach activities to schools and community organizations. This adds enormous value in the development of a civic culture that connects both long- and short-term residents with their place in the social structure and history of the community.

Key Customers

OHA's key customers and stakeholders include:

- Residents, tourists and incidental visitors ;
- local businesses including, but not limited to, hotels, restaurants, realtors, banks, non-profit agencies;
- community groups, including Act for Alexandria, Alexandria Scholarship Fund, Senior Services of Alexandria, Alexandria Historical Society, Historic Alexandria Foundation, United Daughters of the Confederacy;
- heritage attractions not owned and operated by the City of Alexandria, including the Lee-Fendall House Museum and Gardens, Carlyle House Historic Park, Freedom House Museum, George Washington Masonic National Memorial;
- local, regional and state government agencies, including the Counties of Arlington, Fairfax, Loudon, and Prince William, Virginia, Northern Virginia Regional Park Authority, Northern Virginia Regional Commission, Virginia Department of Historic Resources, Virginia Department of Transportation, National Park Service, Federal Highway Administration;
- agencies and departments within the City of Alexandria government including the City Manager's Office, Alexandria City Public Schools, Depts. of Community Resources, Communication and Information, Fire, Housing, Library, Planning and Zoning, Police, Recreation, Parks and Cultural Activities, Transportation and Environmental Services;
- City Boards, Commissions and Stakeholder Advisory Groups, and Task Forces established by the Alexandria City Council, including the Alexandria Commission on Persons with Disabilities, Alexandria Convention and Visitors Association Board of Governors, Alexandria Archaeological Commission, Alexandria Historical Restoration and Preservation Commission, Historic Alexandria Resources Commission, Public Records Advisory Commission, Waterfront Commission, Fort Ward Park and Museum Area Ad Hoc Stakeholders Advisory Group, Fort Ward History Work Group, Woodrow Wilson Bridge Task Force, Freedmen's Cemetery Steering Committee, City Naming Committee, Marketing Coordinating Council;

- public/private City agencies such as the Alexandria Chamber of Commerce, Alexandria Convention and Visitors Association, Alexandria Economic Development Partnership, Alexandria Small Business Development Center;
- Other private schools and educational facilities including, but not limited to, Alexandria Country Day School, Episcopal High School, Bishop Ireton High School, St. Mary's School, St. Rita's School, Saints Stephens and Agnes School, McLean Public Schools' Project Enlightenment Program.

Ownership

There has traditionally been a strong sense of citizen ownership and cohesion in Alexandria, and residents are generally engaged and active in the affairs of the community. Despite a high proportion of transient residents that move in and out of the community (20% population turnover with a two-year period) due to its proximity to nearby Washington, D.C., the special character and nature of the place also encourages long-term residency and a high level of citizen participation. New residents are often surprised at the large number of lifetime residents who still live in the community, as well as descendants of past generations of Alexandrians. Together, this partnership supports a future for the City that recognizes inevitable urban development based on public need and appropriateness, but one that includes historical reference and unusual public amenities.

Products and Services

OHA is the comprehensive public history agency for the City of Alexandria and provides multiple services relating to archival management, archaeology, cultural resource management, heritage interpretation, historic preservation, the humanities, museology, oral history and public records. OHA operates its administrative unit at Lloyd House, and is comprised of seven separate and distinct museum and historic site locations, the City Archives and Records Center, and serves more than 150,000 residents and over 2,000,000 potential visitors to the City annually. OHA's institutions provide educational and interpretive activities for lifelong learners through a wide variety of children's and adult learning experiences including school and public programs, exhibits, and special event opportunities. Although many of its facilities, services and programs are discretionary, OHA also maintains requirements of two activity functions mandated by state or local law: the administration of the City of Alexandria Archaeological Code, and the preservation or destruction of public records as established by the Commonwealth of Virginia. OHA is also responsible for providing comments to the Old and Historic Alexandria District and Parker Gray Historic District Boards of Architectural Review, and maintaining the historic preservation and open space easement program within City boundaries. OHA also manages extensive collections of artifacts, documents, period furnishings, fine and decorative arts in trust for current and future generations at both site-specific and centralized locations.

Significance

Although Alexandria was founded in 1749 by the colonial government of Virginia, the City's strategic location on the eastern seaboard and access to fertile lands and abundant waters has made it a significant place of human habitat for thousands of years. The oldest artifact associated with human activity in the area, a broken Clovis Point discovered in 2007, dates settlement of the area to 13,000 years. The geographic location along the Potomac River connected early Indian settlements by the river and via a north-south trail that extended in segments along the east coast, much like the roadway corridors that became Route 1 and Interstate 95 traverse the City today. This prominent and central location was crucial to Native Americans and in the development of European settlement patterns in the American colonies. Specific periods and themes relating to Alexandria's significance are as follows:

- American Indian Heritage – 13,000 B.P. (Before Present) –1608
- Exploration & Early Settlement – 1608–1731
- Tobacco Port – 1732–1749
- Development & Early Growth – 1749–1770
- American Revolution/Birth of the Nation – 1771–1814
- International Port – 1815–Civil War
- Secession & Civil War – 1861–1865
- Reconstruction & Expansion of African American Neighborhoods – 1865–1890
- Early 20th-Century Industrialization & Processing – 1891–1929
- Early Historic Preservation & Tourism – 1930–1940
- Center for National Defense – 1940–1950
- Bedroom Suburb/Urban Renewal/Modern Historic Preservation – 1950–1985
- Regional Urban Center – 1985 – Present

Stewardship

The proper management of resources is an essential component of the ethical responsibility that OHA seeks to maintain. OHA recognizes that the protection, conservation and preservation of the City's irreplaceable historical treasures are its paramount duty, and one of primary importance to the City of Alexandria. OHA acts as the proper steward to protect and preserve the City's historical resources on behalf of all current and future Alexandrians.

WHERE DO WE WANT BE?

Internal Strengths, Weaknesses, Opportunities and Threats

One of OHA's chief goals is to align its mission with the needs of the increasing diverse population of the City of Alexandria, and the two million visitors who travel to the city each year. Noted for its historic and architectural significance, and recognized for its contemporary charm and strategic location, Alexandria has evolved over the past half century from a sleepy suburb of Washington, D.C. to a bustling city comprised of a series of urban villages. Although one of the most densely populated cities in the United States, each Alexandria neighborhood maintains its own distinctive character, and all are bound together by a very high sense of civic pride and community spirit. A SWOT analysis of OHA identified a series of issues as follows::

Strengths	Weaknesses	Opportunities	Threats
Quality Employees	Difficulty to Recruit quality candidates	Excellent retention, ability to reach larger pool of applicants	High cost of living in NOVA, traffic, commuting costs
Strong Leadership/CMO/ City Council	Competing priorities of City needs	Integration of history into City initiatives and special projects	Reduction in resources due to competing priorities, mandates
Focus on Performance Measures	Elimination of necessary activity based solely on quantitative results	Increase in resources based on comprehensive evaluation of results	Inaccurate or ineffective survey/ measurements
Financial Resources- City	Budget reductions in two previous years	City tax revenues increasing after impact of recession	Long term reductions due to decreases in discretionary spending
Financial Resources- Private	Inability to pursue all opportunities with existing staff	Addition of dedicated development staff possible in future	Ongoing reduction of individual, foundation and corporate support possible due to tax code reform
Financial Resources- Other Government	Inability to pursue all opportunities with existing staff	Additional of dedicated development staff possible	Permanent reduction of state and federal grants projected as gov't. agencies retract
Excellent internal and external research resources	Lack of dedicated research staff, time for existing staff	Integration of new research into ongoing initiatives	Prioritization of activities impacting maintenance & Research
Condition of OHA Facilities/CFMP Historic Preservation Funding	Insufficient building maintenance funding in operating budget, ADA issues at sites	Development of grants to supplement City maintenance, historic preservation and accessibility	Future reductions in operating budget for maintenance and accessibility due to competing priorities.
Adhere to highest Standards & Best Practices	Ongoing staff shortages may result in decline of standards & best practices	City tax revenues increasing after impact of recession, allowing staff recruitment	Long term reductions due to decreases in discretionary spending may reduce staff
Dedicated, diverse and highly educated volunteers	Inability to train and provide proper supervision to increasing numbers of volunteers	Ability to attract, recognize and maintain quality volunteers	Impact on young people and retirees of high regional cost of living discourages residency

HOW DO WE GET WHERE WE WANT TO BE?

The Office of Historic Alexandria Five-Year Departmental Strategic Plan 2012-2016

Strategic planning was initiated to determine community needs, set meaningful and measurable goals, and to define the future course of action desired by citizens and visitors, volunteers, City Council, Boards and Commissions, Stakeholder Advisory Groups, History Work Groups, local historical and cultural organizations, and OHA staff.

OHA's Plan is based on input from community representatives as well as data from surveys of guests, members, "Friends" groups, Boards and Commissions, Stakeholder Advisory Groups and educators. The plan establishes an overarching strategic goal of community ownership and engagement. To reinforce that strategy, OHA has revised or created new mission, vision and educational philosophy statements, defined our core values, established guiding principles, defined six supporting strategic goals and eighteen objectives for the department. The plan also establishes measurable outcomes in support of our commitment to be a community-based, community-relevant and community-centered organization.

OHA Departmental Mission Statement - *The Office of Historic Alexandria (OHA) enhances the quality of life for City residents and visitors by preserving and interpreting Alexandria's historic properties, archaeological sites, cultural resources, artifact collections, objects, archives, records, and personal stories, and by encouraging audiences to appreciate Alexandria's diverse historic heritage and its place within the broader context of American history.*

OHA Departmental Vision Statement - *to be the leader in authentic, engaging, and imaginative history learning experiences for all who live in or visit the City of Alexandria, Virginia.*

OHA Education Philosophy Statement - *OHA's departments of education work to integrate research, discovery, public outreach, and educational opportunities. Education and outreach include hands-on experience, tours, role playing, and school programs, using specific and appropriate primary resources. The intent is to engage citizens, students, and visitors of all ages in the adventure that is American history.*

OHA Departmental Core Values - *Our Core Values define the values of our department, institutions, and people. These are the values by which we treat others, wish to be treated individually and the values we promise to embrace.*

CREATIVITY- Our work products and programs are original, expressive and imaginative

COLLABORATION- We work together in a joint intellectual effort and are mutually supportive

EXCELLENCE- We strive to excel and demonstrate quality and superiority in our programs

FAIRNESS- Our actions demonstrate consistency and transparency

FLEXIBLE- We operate within established guidelines to reach the best possible outcome

INTEGRITY- We adhere to the highest standards of our profession

PRACTICAL- We determine solutions that are cost effective, accurate and equitable

STRATEGIC- We preserve and promote the past, to position the City of Alexandria for a better future

OHA Guiding Principles –

OHA's Guiding Principles mirror those established by the City of Alexandria in 2010:

ETHICAL BEHAVIOR – We act ethically by putting the public interest first, communicating openly, and consistently demonstrating professional integrity.

INNOVATION – We are not satisfied with the *status quo*; we value creativity and well-considered risk-taking as means to achieve organizational success.

LEADERSHIP – We have the courage and energy to step outside the existing culture, to start evolutionary, meaningful and sustainable change by creating new realities and moving people to purposeful action in order to overcome political, bureaucratic and resource barriers.

PROFESSIONALISM – We are capable, lifelong learners, who model the competencies associated with our field, specialty or area of expertise.

RESPECT – We will avoid drama by exhibiting civility, empathy and restraint.

RESPONSIBILITY – We are accountable, take ownership, and are receptive to feedback, whether favorable or unfavorable, in everything we do.

TEAMWORK – We work cooperatively in a collegial and supportive manner to meet common goals.

Grouped by content and delivery, our guiding principles provide the framework and boundaries for the OHA administration, institutions and related educational experiences. These experiences will involve archaeology, history or pre-history, historic preservation, public records or archival preservation. The result will be an authentic, creative and

imaginative environment for lifelong learning experiences, delivered in an aesthetically pleasing manner.

With City Council support, OHA pledges to maintain the City-owned and operated museum system, the Archives and Records Center, and deliver informal educational experiences designed to promote lifelong learning for diverse and multi-cultural audiences. It is OHA's intent to increase historic knowledge; to enhance public interest and learning in archaeology, history, historic places and sites, historic preservation and restoration, cultural resource management, public and social history, public records and archives; and to create a scholarly and engaging learning forum.

In June 2011 City Council adopted the OHA departmental Code of Ethics for all who work for, or on behalf of OHA (see Attachment A).

OHA Strategic Goals

- 1.0 To master the core functions of each activity within OHA.**
- 2.0 To directly align the OHA Five-Year Departmental Strategic Plan with the Alexandria City Council 2004-2015 Strategic Plan. (See Attachment B)**
- 3.0 To foster a skilled and knowledgeable staff and corps of volunteers within OHA.**
- 4.0 To maintain the highest possible professional standards and implement the best practices and tools associated with the profession to accomplish each function.**
- 5.0 To align our organization, programs and practices to meet the lifelong learning needs of all customers.**
- 6.0 To support and maintain civic culture, ongoing planning initiatives, special projects and economic sustainability within the City of Alexandria.**

OHA Objectives Associated with Each Goal

Goal 1.0 To master the core functions of each activity within OHA.

Objective 1.1 Preservation of Buildings & Sites

To achieve the highest possible standard of preservation and maintenance for OHA facilities.

OHA clearly recognizes that routine maintenance is one of the highest levels of historic preservation. As such, the department seeks to maintain historic building fabric and infrastructure at OHA facilities through its annual operating budget, rather than defer maintenance and replace original building materials at a later time through a capital appropriation. However, the department also applauds the actions of the Alexandria City Manager, Mayor and City Council to maintain an ongoing annual capital budget for OHA projects to maintain and restore facilities that require major attention.

Working with the Department of General Services (GS), OHA has developed a list of departmental Capital Improvement Projects (CIP) to be implemented within the timeframe established by this plan. This list that follows will be reviewed and updated annually to adjust to changing realities, threats or opportunities that advance the preservation of Alexandria's historic resources during the five-year period covered by this plan. These projects are planned for OHA facilities through the Capital Facilities Maintenance Program (CFMP) funding in the City's approved Capital Improvement Program (CIP). As a result, this level of funding can likely be sustained by the projected City CIP. A list of CIP projects projected during the period of the plan can be found on the following page:

OHA CIP FY12 BUDGET - (Projections FY12-FY16) ¹					
OHA CFMP	FY2012	FY2013	FY2014	FY2015	FY2016
<i>Gadsby's Tavern Museum</i>	\$20,000 Lighting Study		\$43,000 Exterior Repairs	\$250,000 elevator	
		\$55,000 Brick Point-up			
<i>Gadsby's Tavern Rest.</i>					
<i>Archaeology</i>				\$13,000 Interior Repairs	\$45,000 Interior Paint
<i>Archives</i>	\$15,000 Shelving				\$80,000 Planning & Design
<i>Apothecary</i>				\$5,000 windows	
<i>Lyceum</i>	\$25,000 Painting	\$110,000 Roof Repairs, HVAC \$145,000			\$160,000 South Entry Portico
	\$23,000 Roof Repairs				\$30,000 Interior Paint
<i>Ft. Ward Museum</i>	\$80,000 Replc/Rpr Revtmnts, ADA Walkway	\$24,000 Museum Interior Paint	\$150,000-Museum Addition office upgrades	\$75,000 ADA Walkway-Fort	
	\$12,000 Soil Erosion Control		\$7,000 Soil Erosion	\$7,000 Soil Erosion	\$7,000 Soil Erosion
	\$15,000 Ramp				
<i>Lloyd House</i>	\$20,000 Cornice repair		\$45,000 Flooring repairs		\$20,000 Exterior Painting
	\$85,000 Brick Patio Repairs				\$3,000 Well roofing
	\$25,000 Int Floor Repairs				
<i>Friendship FH</i>	\$20,000 Interior paint		\$55,000 Exterior Paint		
<i>Black History</i>	\$5,000 Interior Painting	\$11,000 Exterior Paint	\$45,000 Exterior Repairs		
TOTALS:	\$345,000	\$345,000	\$345,000	\$345,000	\$345,000

1. Represent planning level estimates that will need to be refined and adjusted.

Objective 1.2 Commitment to Collections Care and Management

To achieve and maintain the highest quality standard for collections care and management.

OHA is the steward of extensive collections of artifacts, documents, fine and decorative arts relative to Alexandria's heritage. In addition to its ongoing responsibilities to protect and preserve these resources for future generations, the department must evaluate the future needs of the collections and the people who learn from them. Currently, document storage at the Archives and Records Center on S. Payne Street, as well as the museum storage and Collections facilities within the same building, are rapidly reaching capacity. OHA anticipates that interim improvements, such as installation of high density shelving, can extend the capacity of the building within the timeframe of this strategic plan, but that planning for new document and/or collections storage must begin within the next Five-Years. OHA is currently digitizing certain collection files for eventual inclusion on the departmental website, and the department intends to continue digitization projects in the coming years. The department also is committed to acquiring new and meaningful additions to the City's history collections, and to the implementation of selected conservation projects associated with select items from each site's collections.

Objective 1.3 Maintain Administrative and Legal Mandates

To maintain the highest standards of administration, ethics, and legally mandated requirements.

OHA will maintain all administrative, ethical and legal obligations during the period of this plan. Strong administrative policies are in place, and best practices are routinely incorporated into departmental operations. A departmental Code of Ethics was approved by City Council in June 2011. Two activities of the department are mandated: archiving and disposing of Public Records as per State law, and administration of the Archaeological Code of the City of Alexandria. OHA will also continue to perform reviews and provide recommendations for the City's Boards of Architectural Review, and administer the architectural and open space easement program of the Alexandria Historical Restoration and Preservation Commission (AHRPC). OHA will also work with AHRPC to secure new easements during this time period to further protect the historic resources of the City. The department will also function as the liaison to the Historic Alexandria Resources Commission, Alexandria Archaeological Commission, and Public Records Advisory Commission. As part of the Alexandria Historic Preservation Management Plan initiative, OHA will also explore new legal strategies and programs to enhance preservation in the City, such as the utilization of historic preservation tax credits for private property owners.

OHA will continue to prepare annual budget requests to the City for its facilities, and request additional funding when appropriate to replace staff lost during the recent recession, new staff

necessary to generate additional programming and revenues, and non-personnel costs associated with increased service delivery. The department will also request an increase in the City's base budget to further fund annual operations at the Stabler-Leadbeater Apothecary Museum. Although the Apothecary has received only partial funding since its acquisition by the City in 2006, the department has been able to maintain a full level of services primary by supplementing general fund expenses with donations.

During the time period covered by this plan, OHA will also make safety issues a major priority of the department. In addition to City safety regulations, the OHA Director has recently appointed a departmental Safety Committee to coordinate safety issues among facilities and to annually review and recommend updates to the disaster plans for each facility.

Goal 2.0 To directly align the OHA Five-Year 2012-2016 Strategic Plan with the Alexandria City Council 2004-2015 Strategic Plan. (See Attachment B)

Objective 2.1 Celebrate Diversity

To attract a more diversified and multi-cultural audience to Alexandria's historic sites and cultural events, and to create programs targeted to new immigrants to the City of Alexandria. To develop new museum exhibits/programs to serve Alexandria's newest and increasingly diverse immigrant populations, and expand the base of historical knowledge of all Alexandria neighborhoods and urban villages. To generate an increased awareness and appreciation of the heritage of the entire City. To develop new museum exhibits/programs to serve Alexandria's newest and increasingly diverse immigrant populations, and expand the base of historical knowledge of all Alexandria neighborhoods and urban villages. To generate an increased awareness and appreciation of the heritage of the entire City.

Through the ongoing initiatives of the Alexandria Black History Museum, and special projects at other OHA facilities, the department celebrates the vibrant diversity of Alexandria through its services and public programs. Also, the OHA director is a member of the City's Diversity Committee, and the department participates in the annual Diversity Plan maintained by the City's Dept. of Human Resources. During the time frame established by this departmental plan, OHA will initiate its own Diversity Committee, and implement diversity issues identified in City Council's Strategic Plan. The department will also coordinate with the Human Rights Commission and Commission on Persons with Disabilities to identify issues associated with projects at all OHA sites.

Objective 2.2 Expand Outreach and ADA Services

To develop accessible programs and increase participation in OHA programs services.

A major objective contained in the Alexandria City Council Strategic Plan is to "Increase accessibility and public participation in arts, library, historical, archaeological, and cultural

resources.” OHA will continually review its facilities for physical access and compliance with ADA issues. OHA will partner and expand cooperation with Alexandria arts and historical organizations, as well as the City Library and Alexandria Archaeology to develop an inter-disciplinary approach to increase public access and participation in cultural activities during the timeframe of this plan. OHA will also continue to maintain staff support to Boards, Commissions, Stakeholder Advisory Groups and City committees to promote and disseminate local history initiatives. OHA will also continue to expand information on City history through website and electronic means, a new hardcover book on Alexandria history, and continuation of *The Alexandria Forum* decorative arts seminars.

One of the primary requests heard by OHA of community residents during the public planning process was the need for increased outreach services. Residents were particularly concerned that OHA identify and increase services to new audiences and those with special needs. Residents also requested that the department increase efforts to promote historic preservation issues, historic restoration techniques and information, and to provide education services on topics related to local architecture and history.

OHA has identified a number of new initiatives in this plan that address this issue, including development of a series of lectures and workshops that address history and preservation concerns, development of programs for new audiences that address the needs and diversity of specific audiences, and the continuation of offsite programs known to be important to the community.

Other concerns expressed during the public process were considered by OHA, but do not appear to be achievable during the timeframe of this plan. These are providing a public bus service to transport OHA museum guests to and from their homes, and from site to site. Currently there exists a comprehensive public transportation system within the City of Alexandria that reaches and connects every OHA museum within the City, and new door-to-door service would be very costly and duplicative.

Another suggestion, that OHA obtain and outfit a “Museum Bus” that would incorporate collections and exhibit items from across OHA museums to travel to City schools and other locations, also appears to be out of reach at this time. OHA will continue to provide outreach programs to schools, organizations and groups that promote visits to OHA museums and provide an advance orientation to museum resources.

Objective 2.3 .Enhance Preservation & Development Planning Initiatives-

To preserve and enhance Alexandria’s historic character and cultural resources, and to reflect the distinctive nature of its urban villages and neighborhoods, to attract and maintain businesses, residents, and visitors.

Alexandria's neighborhoods are distinctive for their gracious, appealing character which draws visitors, residents, businesses, and prosperity here. This distinctiveness is a result of the ongoing emphasis on preservation, whereby heritage is integrated with, instead of compromised by, ongoing development. The appeal is vital because Alexandria's historic structures, open spaces and artifacts are real and play a major part in the daily life of its citizens. Together they form an authentic urban environment unmatched by any theme park or modern development.

It is understood that the City of Alexandria is nearly built out with little undeveloped property remaining. Increasingly, new development will occur as re-development, and may include increasing height limits, higher densities, and mixed use projects. These realities must be creatively and carefully managed to coordinate with preservation objectives and to provide public amenities, including those which promote an increased understanding of local history.

A management plan covering historic preservation issues has been identified as a major priority for City Council, and the City is committed to update and further research information on existing historic areas so that planning decisions can be made using the most accurate information. This effort will include an update of the National Register Old and Historic Alexandria District, completion of the 100-Year-Old Buildings List, and developing new research efforts to identify previously unidentified historic resources within the City.

Planning & Zoning Coordination

This Strategic Plan outlines tasks and areas of interest for an efficient and beneficial historic function in Alexandria. The Office of Historic Alexandria overlaps in its interests with some of the functions of the City's Planning and Zoning Department as to historic preservation. The two agencies should coordinate activities and tasks so that there is clear understanding of roles and budget limitations and so that common interests and arenas are not duplicated. OHA's implementation of the goals and objectives identified in the *Alexandria City Council 2004-2015 Strategic Plan* (see Attachment B) envisions the continuation or initiation of projects and actions in its own departmental plan to achieve the following initiatives within the five-year period as laid out by City Council:

Enhance the Role of Historic Preservation in Economic Sustainability through completion of Alexandria Historic Preservation Management Plan*

During the past 20 years, the historic preservation movement has become a broad-based, multi-faceted movement where historic resources are means, not ends. And preservation has become a means of downtown revitalization, neighborhood stabilization, affordable housing, luxury housing, heritage tourism, education, and economic development. ** By completing the Alexandria Historic Preservation

Management Plan, authorized by City Council in 2008, Alexandria can incorporate the latest innovative strategies and best practices for its preservation “toolbox.”

Support Sustainable Heritage Development opportunities*

Sustainable Heritage Development is a revitalization strategy that enhances local quality of life through activities— preservation, conservation, recreation, interpretation, and community capacity building—that demonstrate respect for the people, the place, and the past. ***

Promote Heritage Tourism initiatives*

In Virginia, a recent study defined heritage visitors as those who did one or more of the following: visited a museum (in the Commonwealth, around 90% of the museums are history museums), visited a Civil War battlefield, or visited an historic site, and contrasted those patterns with visitors to Virginia who did none of those things. The study confirmed that heritage visitors stay longer, visit twice as many places, and on a per trip basis spend 2.5 times as much money as other visitors. Wherever heritage tourism has been evaluated nationwide, this basic tendency is observed: heritage visitors stay longer, spend more per day, and, therefore, have a significantly greater per trip economic impact. **

Review Historic District guidelines and standards to maintain local property values*

Experts and institutions have studied the economic impact of historic district ordinances on real estate values across the country, using a variety of methodologies, with a consistent finding. Far and away the most common result is that properties within local historic districts appreciate at rates greater than the local market overall and faster than similar non-designated neighborhoods. Of the several dozen of these analyses performed nationwide, the worst-case scenario is that housing in a historic district appreciates at a rate equivalent to the local market as a whole. **

Preserve historic buildings to assist development of new businesses and jobs*

A frequently unappreciated component of historic buildings is their role as natural incubators of small businesses. Currently in the United States, firms employing less than 20 people create 85% of all net new jobs. One of the few costs that firms of that size can control is occupancy cost – rents. In historic downtown areas, but especially in neighborhood commercial districts, a major contribution to the local economy is the relative affordability of older buildings. It is no accident that the creative, imaginative, small startup firm isn’t located in the corporate office “campus”, the industrial park, or the shopping center – they simply cannot afford the rents there. Older and historic commercial buildings play that role, nearly always with no subsidy or assistance of any kind.**

Promote Historic Preservation practices as environmentally “Green”**

Landfills throughout the country are increasingly expensive in both dollars and environmental quality. Although a quarter of all waste dumped at the landfill is from construction debris, rarely is the environment impact caused by the demolition of historic buildings considered. However, it is estimated that for every small building demolished in Alexandria, the entire environmental benefit from community recycling of 1,344,000 aluminum cans is wiped out. The adaptive reuse and/or rehabilitation of historic buildings can considerably reduce the environmental, energy and labor costs associated with building replacement.**

Jobs that created and increased local household income are positive economic development measurements that result from the preservation of historic buildings.*

The rehabilitation of older and historic buildings is particularly potent in creating new jobs and increased local income. As a rule of thumb, in the United States, new construction costs are roughly half materials and half labor. Rehabilitation, on the other hand, results in sixty to seventy percent labor costs, with the balance being materials. This labor intensity affects a local economy on multiple levels by re-circulating that paycheck within the community through the purchase of other goods and services.**

Rehabilitation of historic buildings has a greater impact on economic development than manufacturing or new construction*

It is estimated that for the average manufacturing concern in Virginia, every million dollars of production means that 25.1 jobs are created, adding an average of \$558,082 to local household incomes. A million dollars spent on new construction will likewise create 32.2 jobs, adding about \$726,300 to local household incomes. However, those same million dollars in the rehabilitation of an historic building in Virginia yields 36.1 jobs, and adds nearly \$780,000 in new household income. And as real estate is a capital asset – like a drill press or a boxcar, it not only has an economic impact during construction, but a subsequent economic impact when it is in productive use. Additionally, since most building components have a useful life of between 25 and 40 years, a community could rehabilitate 2 to 3 percent of its building stock per year and have perpetual employment in the building trades.**

A full copy of the revised *Alexandria City Council 2004-2015 Strategic Plan* may be found online at www.alexandriava.gov.

* Historic Alexandria Resources Commission priority or key issue

** Source- Economist Donovan Rypkema, Speaker at the Alexandria Historic Preservation Conference, May 2007.

*** Source- *Long Island North Shore Heritage Area Management Plan*, Peter J. Smith & Company, Buffalo, New York, December 2006.

Goal 3.0 To foster a skilled and knowledgeable staff and corps of volunteers within OHA.

Objective 3.1 Maintain and Recruit Best Possible Candidates for Open Staff Positions

To develop a high caliber staff that is well educated, professional and knowledgeable about history, archaeology, museology, finance and records management.

During the past five-year period, due to citywide budget pressures, OHA has lost a number of positions throughout most facilities of the department. During the next five years as the City's economy improves, OHA will request that certain positions eliminated during the recession be considered for restoration in a phased implementation. Specifically the department intends to request a Secretary position at Gadsby's Tavern Museum, a Curator I position at Alexandria Black History Museum, a Records Clerk position at Archives & Records Center, a Research Historian position in Administration, conversion of a PT to FT Museum Technician at Fort Ward Museum, the addition of part-time "Roster" staff at Alexandria Archaeology Museum and at Alexandria Black History Museum, and for a Special Events/Rental activities team trained to work at multiple sites. OHA will also seek to appoint a volunteer Town Crier and recommend the creation of a Development Officer/Deputy Director within the department. OHA will also work to maintain its successful volunteer program and to recruit new volunteers for its activities.

Objective 3.2 Expand Volunteer Support

To maintain and expand a high quality corps of volunteers throughout all OHA activities.

OHA's existing base of nearly 400 volunteers is substantial, and together they contribute thousands of hours of support annually. OHA will continue to recruit volunteers, subject to the ability of existing staff to manage, train and supervise additional volunteers at specific sites.

Objective 3.3 Maintain and Expand Staff Development Opportunities

To provide membership in appropriate professional membership organizations, access to quality publications, conferences and training for OHA staff.

Staff development is a major priority for OHA, and the department recognizes the need for staff to travel and participate in professional conferences and training (either as participants or

presenters), maintain membership in related organizations, and to have access to the latest professional journals, publications and materials. Maintaining a dedicated source of funding in annual budgets for conferences, training, professional memberships and publications is in the highest interests of the department and the citizens of Alexandria.

Goal 4.0 To maintain the highest possible professional standards and implement the best practices and tools associated with the profession to accomplish each function.

Objective 4.1 Expand Partnerships

To enhance communication and collaborative connectivity among Alexandria historic organizations, attractions, libraries and museums to promote sharing information, effort and resources.

OHA has long been recognized as a major partner in the Alexandria community, and has maintained excellent relationships with local organizations and groups for many years, including Agenda Alexandria, Alexandria Chamber of Commerce, Alexandria City public Schools, Alexandria Convention and Visitors Association, Alexandria Economic Development Partnership, Alexandria Historical Society, Alexandria Library, Alexandria Marketing Committee, Historic Alexandria Foundation, Lee-Fendall House Museum and Garden. Mount Vernon Estate and Gardens, Northern Virginia Regional Park Authority, Northern Virginia Urban League among others. OHA will also continue its relationship and financial support of the National Capital Boundary Stones Committee that coordinates the preservation and conservation of the historic corner and boundary stones placed in 1791 at each mile interval surrounding the City of Washington, D.C. Alexandria, Virginia, once part of the District of Columbia (from 1801 until 1847), still retains four of the original boundary markers, including the first and southernmost cornerstone place that marked the land that became the nation's capital.

From FY 2012 through FY 2016, OHA will also work to expand its relationships with Alexandria's businesses, corporate and non-profit agencies to develop a wider base of support for departmental operations. One example of this expansion will be the development of new, "behind the scenes" museum tour experiences available for concierge-level guests in the City's hotels, as a way to generate new revenue sources for supplemental funding in support of each museum, and increase understanding of OHA's role as the steward of Alexandria's heritage.

New "Friends" groups are also proposed in the department, such as implementation of the OHA departmental membership program and the proposed "Friends of Lloyd House" now being pursued by OHA in conjunction with the Alexandria Historical Restoration and

Preservation Commission. Existing “Friends” groups will also be maintained with expanded membership during this plan’s timeframe.

OHA also seeks to partner with the Alexandria Library to digitize documents and photographic collections to make them more accessible to researchers and the general public, and to develop potential new resource and revenue initiatives for both City agencies. Specific historic resource projects that could be targets for grants and other funding to OHA/Alexandria Library from other sources that could fall into three general categories:

1. Reviews of literature: Product(s) would be critical review article(s) suitable for publication in a regionally oriented academic journal;
2. Grants for digitization, cataloguing and indexing collections and other known historical resources within the City of Alexandria: Target should be publication of resources to the Web in formats and with access controls appropriate to the respective endeavors – with a well-developed and appropriate set of search terms for each published project;
3. Annotated catalogs of Alexandria historical resources located elsewhere, e.g., the papers of Kate Waller Barrett or Guy Atkinson that are housed at the Library of Congress could be an annotated collection of papers in its collections relevant to Alexandria.

In 2011, the OHA director was appointed by the United States Secretary of the Interior to a two-year appointment on the Star Spangled Banner National Historic Trail Advisory Council. The purpose of this Council is to make recommendations for planning initiatives associated with the new War of 1812 history trail that will traverse Maryland, Washington, D.C. and Virginia. This new partnership will also assist OHA in its War of 1812 programming efforts.

Objective 4.2 Pursue Best Marketing Strategies

To develop market research for each site that will provide an increased level of visitor engagement and result in increased visitation. To more effectively market and “brand” OHA sites, and to use market research surveys to develop responsive public history programs.

OHA will continue to increase its marketing and branding capabilities over the five-year period of this plan. Utilizing the new City funding for the Civil War Sesquicentennial, OHA will coordinate with the Virginia Tourism Corporation and Alexandria Convention and Visitors Association to target advertising dollars to heritage audiences, to develop tourism packages such as the successful “Key to the City” program, and will develop new printed and electronic materials to promote Historic Alexandria activities. The department will attempt to increase e-news subscribers to OHA’s electronic newsletters by 5% annually.

The OHA director will also continue to serve on the City's Marketing Coordinating Council, which recommends City funding for innovative business initiatives that increase retail, lodging and dining opportunities to increase public enjoyment of Alexandria, and increase tax revenues to the City.

Objective 4.3 Incorporate New Technologies into Programs and Services

To increase technological abilities through point of sale, collections, and fund raising software to complete redevelopment, enhancement, and expansion of content of the OHA departmental website.

OHA pioneered the use of social media in Alexandria's City government, and seeks to continue to be a leader in the use of technological resources to promote heritage services. Although over the past several years OHA has developed interpretive and marketing programs based on new technologies, such as cell phone tours, a Civil War app, and archaeology geo-caches, it is committed to advancing new technology applications as they develop.

A major priority will be to partner with the Dept. of Planning and Zoning to upgrade GIS applications and Surfer software for archaeological and historic district surveys and analysis in conjunction with the proposed Alexandria Historic Preservation Management Plan, and to implement the TAM retail system for OHA and other City departments.

Goal 5.0 To align our organization, programs and practices to meet the lifelong learning needs of all customers.

Objective 5.1 Maintain and Expand Research Services

To present an accurate, authentic, and complete history of the community and maintain its local, regional, national and international reputation as a heritage and cultural destination.

With the elimination of OHA's Research Historian position in FY 2010, the department transferred necessary site specific research to facilities associated with that requirement, and the Administrative Unit accepted responsibility for general historical research within the mission of the department. However, during that year a major research project on the African American settlement known as "The Fort" at Fort Ward Park, outside the Museum and Historic Site area, was requested by the community. OHA had not included such an initiative in its annual work plan for that year, nor had the project been recognized as a priority in future years.

However, in response to intense community interest and concern for the issue, OHA established a Fort Ward History Work Group, comprised of staff from select OHA museums and area residents and historians. This team, the first of its type in OHA, has worked together to provide ongoing research and support services to document the unusual heritage of the African American settlement that occupied the former Civil War fort site for nearly a century from the post-war period until about 1960. Though OHA staff was initially skeptical of the concept, the result has been a rousing success with documented research advancing archaeological and interpretive goals at the site, including the identification of long forgotten burial locations, well beyond expectations. The goal now is to complete enough of the Fort Ward research by 2013 so that a history and interpretive plan for the park can be prepared.

During the five-year timeframe established by the plan, OHA intends to establish other History Work Groups to work on other research topics of interest to the City or research topics identified by OHA as priorities. Staff would, of course, oversee the Work Group documentation process and coordinate individual efforts on the team project.

OHA will also work with other City agencies to prepare historical information for new street/place names, and for naming opportunities for other public cultural locations throughout the City.

Objective 5.2 Enhance Education & Life Long Learning Opportunities

To develop engaging and visionary learning experiences for all.

OHA recognizes that one of its primary roles is as a facilitator of lifelong learning experiences for residents and visitors to Alexandria. OHA currently operates heritage programs for all ages from toddlers to seniors, and the department commits to maintaining and reenergizing its programs in the years ahead,

A major initiative will be to improve interaction with area schools, including revising OHA educational programs to coordinate with state learning standards and local curriculum, participation in the "Community Schools" program of Alexandria City Public Schools (ACPS), assisting with development of the creation of a "History Club" at T.C. Williams High School, and maintaining the "Project Enlightenment" living history performers in Alexandria, comprised of students at McLean High School.

Objective 5.3 Promote Interpretation of Local, Regional, State and American History

To encourage a greater public appreciation of the value of Alexandria's heritage by gathering, interpreting, and disseminating information on the City's history and its relevance within the

larger context of Virginia and American history. This historical information will be provided to public audiences of all ages through educational programs, exhibitions, publications, the Internet, and other interpretive means.

OHA will continue to advance the interpretation and understanding of cultural and historic resources during the time frame established by this plan. In particular, the heritage focus of the department will be on the national defense issues associated with the War of 1812 and the American Civil War, both of which are recognized by significant anniversaries during the period of this plan, roughly from 2011 through 2015. Both conflicts contain issues that are controversial and uncomfortable from the different perspectives of residents and visitors to Alexandria, and need to be addressed carefully so that all viewpoints can be represented. OHA will attempt to highlight the social significance of each conflict, rather than focus on military heroes and strategy, to promote a greater understanding of the causes, impacts, and ultimate resolution of each war which have brought the United States to its present place in today's world.

OHA has also identified exhibit and event objectives at each OHA site so that an engaging and active public program can be achieved throughout the period of this plan. Special attention to develop programs geared to particular audiences and the needs of residents and visitors to Alexandria is also a priority. The department also commits to maintaining its role in interpretive signage and other public amenities associated with history, that are erected throughout the City during the timeframe of this plan.

OHA will also continue to maintain its ongoing commitment to interpretive activities at the Fort Ward site, "The Fort" associated with the African American settlement that existed in the post-Civil War period, and those National Park Service activities associated with the Captain John Smith Trail and Jones Point Park.

Goal 6.0 To support and maintain civic culture, ongoing planning initiatives, special projects and economic sustainability within the City of Alexandria.

Objective 6.1 Increase Fund-Raising and Development Opportunities

To request financial and staff support to ensure the success of the strategic plan. Financial support should be solicited by OHA from: the private sector, including individuals, businesses, corporations, foundations and non-profit agencies, through requests from private, federal and state grant funding sources, through preservation tax credits for individual and commercial property owners, and through City support of OHA's annual operating and capital budgets. To develop new (and increase current) grants, retail, membership, incidental, and special event revenue programs that provide additional non-City financial support to supplement City funding, while maintaining museum admission affordability and membership programs. To develop new museum exhibits/programs to serve Alexandria's newest and

increasingly diverse immigrant populations, and expand the base of historical knowledge of all Alexandria neighborhoods and urban villages to generate an increased awareness and appreciation of the heritage of the entire City so that civic culture is maintained and expanded.

During the past several years, OHA has embarked on a number of new projects to develop new or increased sources of non-City funding. The department has applied for “Project Grants-in-Aid,” developed new programs centered on facility rentals, weddings, birthday parties; and expanded social event activities such as an annual Historic Alexandria Museum Gala. In addition to site-specific museum stores, the department has also opened a new *Historic Alexandria History Center and Museum Store* offering visitor experiences and retail goods from all OHA museums at one location. OHA has also assumed responsibility for *The Alexandria Forum* decorative arts seminar that raises about \$9,000 in annual revenue. Although the development results have been relatively mixed in the challenging economy of the current recession, the department believes these activities will help sustain and supplement City funding in future years. OHA intends to continue and expand these activities in the next Five-Years, as well as initiate new revenue, solicitation and departmental membership programs during this time.

Objective 6.2 Enhance Intermodal Transportation Opportunities

To improve and enhance access to the City’s great wealth of historic sites and attractions, and to enhance the overall quality of life in Alexandria, through participation in programs to help manage and coordinate inter-modal transportation, including pedestrians, bicyclists, mass transit, and vehicular traffic. In support of this effort, the objective is to reduce the amount of tourism-related private car and motor coach traffic in the City, primarily by enhancing directional and interpretive signage, scripting historical information for narrated tours on public trolleys, providing technology-based interpretive applications, and developing walking and bicycle tours that highlight points of interest.

OHA has contributed to Alexandria’s intermodal transportation objectives during the past several years by preparing historical information for interpretive signage along roadways and at transportation centers, preparing four narrated scripts on the new King Street Trolley, and developing projects associated with pedestrians, bikeways and boat travel on the Potomac River. Mitigation of the impact of transportation projects on historic resources, such as replacement of the Woodrow Wilson Bridge on Interstate 95-495, motor coach parking, street repaving and traffic infrastructure installation are also priorities of OHA to be maintained during the period of this plan.

Objective 6.3 Develop and Maintain Special Project Initiatives

To develop Civil War Sesquicentennial, War of 1812 and other historical programs and reenactment events throughout the City of Alexandria, in conjunction with other regional

committees and state committees, such as the Virginia State Commission on the American Civil War Sesquicentennial. To continue historical research and archaeological investigation at Fort Ward Park and the Contrabands and Freedmen's Cemetery, including Native American, Civil War, and African American cultural resources. To annually update the OHA Five-Year Departmental Strategic Plan.

Evaluation and Measurement

Measurement indicators are indicated below, and will be reviewed and/or adjusted as necessary each year as part of the Managing for Results Initiative (MFRI) process followed by the City of Alexandria. This is in line with the annual operating budget of OHA.

At the conclusion of each fiscal year (June 30), the Historic Alexandria Resources Commission, the Alexandria Historical Restoration and Preservation Commission, the Alexandria Archaeological Commission and the Public Records Advisory Commission will evaluate the individual tasks (as appropriate to the commission) that are identified in the Five-Year schedule established by OHA for completion during the year. Results will subsequently be reported to the Mayor and City Council in the annual reports submitted by each commission at the end of the fiscal year. The plan will thus be reviewed, updated, and amended annually to adjust to changing realities, implementation and responsibility.

Performance Measures

For department/museum system as a whole:

1. % of visitors to City historic sites rating their overall experience as good to excellent
2. % of visitors who state they have gained an appreciation of local history
3. Total number of visitors/program participants served
4. OHA operating costs per resident
5. % of department effectiveness targets met
6. # of department FTEs managed

For individual museums:

7. # of visitors/program participants
8. % of visitors who rated their experience as good to excellent
9. Cost per visitor/program participant
10. \$ of revenue earned (The Lyceum-rental revenues only)
11. # of cubic feet of archaeological collections (Alexandria Archaeology Museum only)

For Archives & Records Center only

12. # of boxes received and destroyed
13. # of research/records requests processed
14. Cost per box received and destroyed
15. % boxes processed that met government standards
16. % of requests fulfilled within five days

The result of this strategic planning process is a five-year implementation schedule to implement, measure and assign responsibility for specific initiatives and tasks (Actions) necessary to achieve the goals and objectives identified in this OHA plan. These are established in the list of initiatives on the following pages: